

SYSTEMS AND METHODS FOR CLIENT RELATION MANAGEMENT

CROSS-REFERENCE TO RELATED APPLICATIONS

[0001] This application is a continuation application of U.S. patent application Ser. No. 16/384,801, filed Apr. 15, 2019, which claims priority to and benefit of U.S. Provisional Application No. 62/657,717 filed Apr. 13, 2018, of U.S. Provisional Application No. 62/703,855 filed Jul. 26, 2018, of U.S. Provisional Application No. 62/746,354 filed Oct. 16, 2018, and of U.S. Provisional Application No. 62/780,035 filed Dec. 14, 2018, each of which is incorporated herein by reference for all it discloses. This application is related to U.S. patent application Ser. No. 14/538,685, now published as U.S. Patent Application Publication No. 2016/0100058 A1, which is incorporated herein by reference for all it discloses.

BACKGROUND OF THE INVENTION

1. Field of the Invention

[0002] The present invention relates to management of client relations, and more particularly to systems and methods for using information gathered and obtained about clients and potential clients to manage interactions with the clients in all stages of interaction with the clients.

2. Background and Related Art

[0003] Most companies employ analytics to track the success of their online marketing campaigns. A key metric used in analytics is the conversion rate. The conversion rate of a marketing campaign is typically generated based on the number of advertisements selected and the number of sales that resulted from these selections. In a typical online scenario, a company pays an advertising service, such as Google AdWords, to present advertisements within a website based on one or more attributes of the user visiting the site or the manner in which the user reached the site (e.g., keywords used in a search, referring site, search history, etc.).

[0004] When a user selects an advertisement, the user is typically routed to the company's website where the user can complete a purchase. When routing the user to the company's website, the referring website typically provides information that can be used to identify the advertisement that the user selected. Then, if the user completes a purchase on the company's website, the purchase can be linked to the advertisement that the user selected indicating that a "conversion" of the advertisement has occurred. Similarly, if the user does not complete a purchase on the company's website, the failure to convert the selection of the advertisement into a sale can be recorded. By tracking the number of times an advertisement is selected and the number of times that these selections lead to a sale, the company can generate the conversion rate of the advertising campaign. A higher conversion rate of an advertisement campaign would therefore indicate that the company should spend more on the campaign. This is one example of how the success of an advertising campaign can be measured, although other techniques can also be employed.

[0005] Although this process of linking a purchase to the selection of an advertisement can be easily accomplished

when the user completes the purchase online, the same is not true when the user completes the purchase offline. For example, many websites provide a phone number (in the U.S., a direct inward dial (DID) number or a toll free number (TFN), or the equivalent in other countries, collectively a "phone number") that a user can call to complete a purchase by speaking with a representative. If the user, after having selected an advertisement to reach the company's website, decides to complete the purchase over the phone, there will be no direct link between the online selection of the advertisement and the offline purchase.

[0006] To address this issue, a technique known as call tracking has been developed. To implement call tracking, a company will employ tracking phone numbers to enable a phone call to be associated with a previous selection of an advertisement. For example, when a user selects an advertisement that routes the user to the company's website, the website can be customized to include a particular phone number that can be uniquely associated with that user for a period of time. Then, if a phone call is received at the particular phone number, the company can know that it was likely the user that made the call since the particular phone number would not have been displayed to other users during the period of time. If the user then makes a purchase over the phone, the purchase can be linked back to the advertisement that the user originally selected. The use of tracking phone numbers in this manner therefore provides a link between the online and offline actions. This link can allow a company to track the conversion rate of its campaigns even though some conversions may occur over the phone.

[0007] Problems may occur with such systems when customers delay between a time when the particular phone number is displayed on the website and when the customer calls the number. This may occur, for example, when the customer is multi-tasking and in switching between tasks delays calling in to the displayed phone number. As another example, the customer may be short on time at the moment, and may write down the phone number to call in later for assistance or to complete a transaction. The reasons why a customer may delay in calling in to the displayed phone number are innumerable. Regardless, such delay is problematic for the company given the cost associated with maintaining a pool of unique phone numbers for use in call tracking systems. Because of such cost, the company typically wishes to reassign the phone number for use with more-active customers (at least at busy times), as most instances where a call is not received in short proximity to when the number is displayed are a result of disinterest. Accordingly, most companies reassign assigned phone numbers after a reasonable period of inactivity, despite the loss of the ability to associate some incoming calls with certain advertising efforts, as a cost of doing business.

[0008] Additional problems are inherent in the costs of maintaining call-in systems. As may be appreciated, the employment of call-in center staff represents a significant cost of doing business in many industries. In some instances and due to the costs involved, a business may elect not to provide call center services or may elect to provide only minimal call-in services. Other businesses may maintain a call center, but it can be extraordinarily difficult to determine the effectiveness of the call center or of any individual call center employee. It can also be difficult to ensure that customers or potential customers who call in to the call center receive the best experience possible.